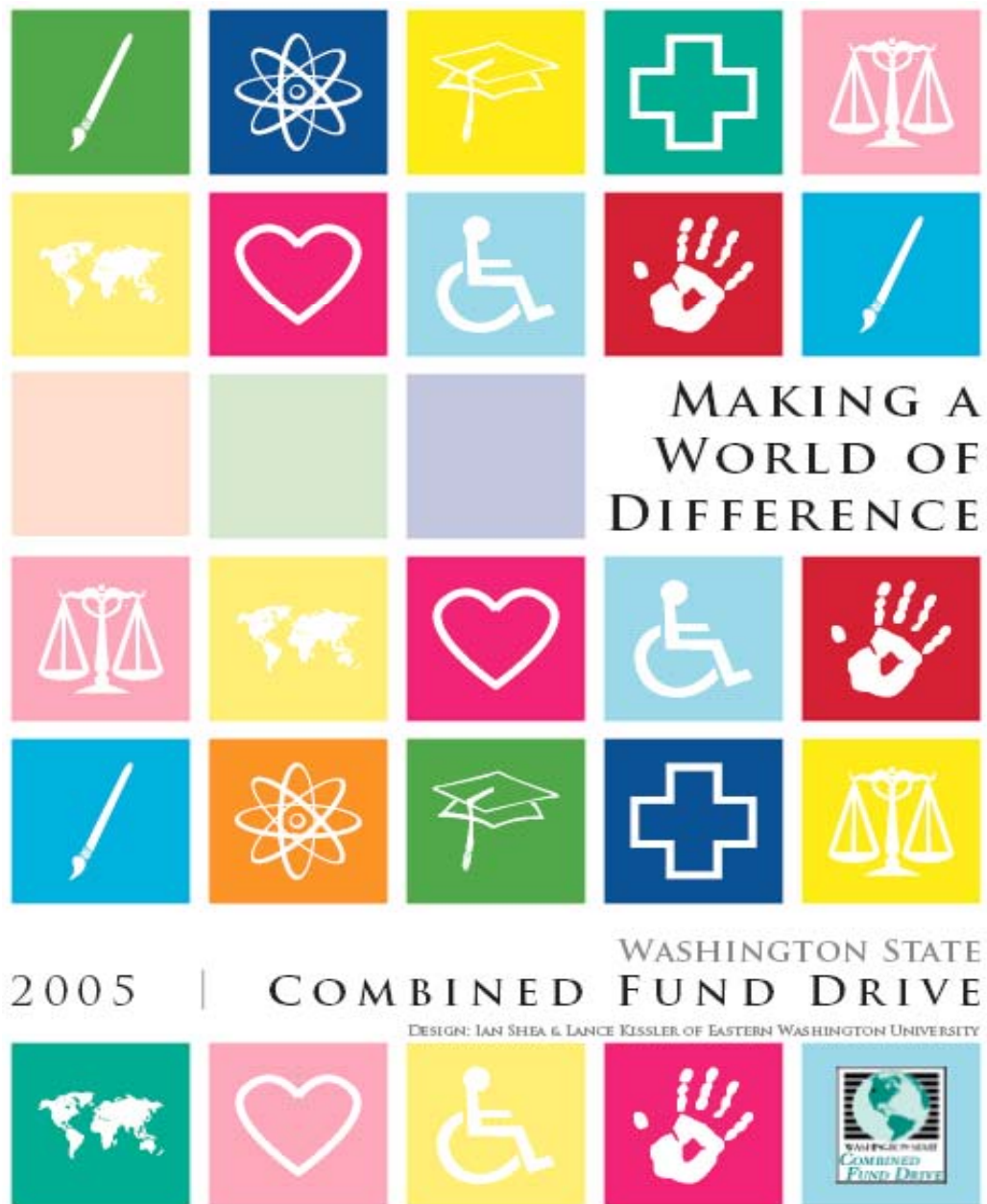


2005 LOCAL COORDINATOR GUIDE



Conducting a Combined Fund Drive campaign can be easy, fun and very fulfilling. As the Local Coordinator, you are the key to a successful campaign for your branch, office or department. This guide contains strategies, tips and ideas that will help you plan your workplace campaign.

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THANK YOU FROM CFD!

We appreciate your serving as a Local Coordinator for your agency or institution of higher education! You are part of an important team of employees around Washington State that is thousands strong!

We want you to know how much we appreciate your time and hard work. Your time is valuable! To facilitate your success, this guide provides you with basic information about the Combined Fund Drive “CFD” and describes the coordinator role into 7 easy steps to success.

Following these steps will ensure a successful and fun workplace campaign with positive results!

The Combined Fund Drive campaign would not be successful without dedicated people like you who believe they can make a difference in their world and the world for others.



This year’s campaign will be the 21st campaign of the Combined Fund Drive. Since the program’s inception over twenty years ago, public employees have contributed more than \$67 million to their favorite charities. In 2004, state employees had their most successful campaign ever, surpassing \$5.46 million in contributions.



Washington State employees’ workplace giving program is the most successful in the nation, based on our number of state employees. Overall, our program ranks fourth in the country!



The CFD is one of only four state programs in the nation to surpass \$5 million in pledges in its charitable giving campaign. This success is a testament of your commitment to educate employees about the value of payroll deduction and the benefits of directing charitable donations through the CFD.

THANK YOU FOR MAKING A WORLD OF DIFFERENCE!

CHRISTINE O. GREGOIRE
Governor



STATE OF WASHINGTON
OFFICE OF THE GOVERNOR

P.O. Box 40002 • Olympia, Washington 98504-0002 • (360) 753-6780 • www.governor.wa.gov

Dear Washington State employees and retirees:

On behalf of the countless hard-working public servants who make Washington State a great place to live, I am honored to kick off the 21st annual Combined Fund Drive (CFD) Campaign and I am proud to serve as its chair.

Since 1984, state employees and retirees have come together to express their generosity and shared commitment to the public good by giving a portion of their paychecks to charity through the workplace giving program. Together, we have raised more than \$67 million in pledges in the last twenty years. The 2004 campaign alone raised \$5.46 million in pledges! Through our joint effort, Washington State is the national leader in charitable giving based on the size of our state. We have a lot to be proud of.

In my inaugural address, I said that I would ask much of our state employees, because I respect and admire all of you and because together I know that we can succeed in any challenge. So this year, I propose another challenge. Let's exceed our previous fundraising high mark of \$5.46 million. I am confident that by working with our teammates at the City of Seattle and the Seattle Monorail Project, we can surpass our own expectations and set new records.

In making your pledges this year, please keep one thing in mind: the money you give has a direct impact on the lives of those who are less fortunate. For approximately the price of a cup of coffee, an elderly homebound neighbor can have five more meals delivered to him for a month. A mere five dollars can provide emergency shelter for five homeless persons. A small monthly contribution can go a long way, but bigger donations can solve bigger problems. So this year let's aim higher.

Fortunately, the Combined Fund Drive has made it easier than ever to give to charity. Now you can pledge online at www.cfd.wa.gov. This allows for more efficiency, greater transparency, additional employee access, and an overall improved use of resources. Payroll deductions are a great way to give because they save you time, give you the freedom to donate to a cause in which you believe, and cut down on burdensome administrative costs to charities.

When we give to charity, we are sending a very powerful message to the people of Washington and the rest of America. State employees are more than dedicated public servants; we also are leaders who care deeply about our communities, our state, and our world. Together we are making a world of difference. Let's show them that we can do better. Let's make it happen!

Sincerely,

Christine O. Gregoire
Governor



- ❖ The Washington State Executive Ethics Board provides the following opinion:
(The complete opinion can be found here: http://www.wa.gov/ethics/opinion_00_09.htm)
- ❖ It states that the CFD is part of the business of the state and can be part of an employee's official duties.
- ❖ Understand that the CFD is part of the business of the state and it is ethical for you to do this on state time.
- ❖ The Governor's Executive Order allows state resources to be used to conduct the campaign.

CFD TEAM CONTACT INFORMATION

Combined Fund Drive

Physical Address: 600 South Franklin
Mailing Address: PO Box 47530
Olympia, WA 98504-7530
Telephone: 360 664 1995
Fax: 360 586-6695
CFD Homepage: www.cfd.wa.gov
Email all CFD staff: cfd@dop.wa.gov

Program Manager:	Randy Ryan	360 664 1994	randyr@dop.wa.gov
Campaign Manager:	Cindy Craig	360 664 6811	cindyc@dop.wa.gov
Office Assistant	Shirley Roberts	360 664 1976	shirleyr@dop.wa.gov

Campaign Executives

King County	Val Meads	253 335 2614	meadsvk@dshs.wa.gov
Thurston County	Juanita Doyon	360 664 6805	juanitad@dop.wa.gov



Call or email the CFD office anytime if you...

- *you need additional resources or supplies like posters, brochures, videos...*
- *want to check on rules and regulations*
- *are looking for a charity speaker*
- *need help with in-house training*
- *want fundraising ideas*
- *want to know what events are going on in your county*
- *want us to publish a successful event or a photo on our website*

We're here to help, promote and celebrate your accomplishments!



Recommended Timeline of Events

Planning	June – August
Training	July – September
Distribution of Materials	Beginning in early September
Campaign	Mid-September to October 31
Wrap-Up and all Forms In	by November 30
Evaluation of campaign successes, plan recognition of volunteers and donors	December

LOCAL COORDINATOR DESCRIPTION

POSITION:

Local Coordinator

REPORTS TO:

Campaign Leader for the Agency and/or Department Head/Director

Campaign Leader: _____ Email: _____ Phone: _____

OBJECTIVE:

To inform employees (and retirees) about the workplace campaign. Provide employees with the opportunity to contribute to charitable organizations through the Combined Fund Drive (CFD) and make a difference by empowering their favorite causes.

RESPONSIBILITIES:

STEP 1. Attend training. Learn the benefits of giving to your favorite charities through the CFD. Become familiar with your agency's campaign rules and procedures.

STEP 2. Secure office management support and involvement in the campaign.

STEP 3. Recruit volunteers to help you.

STEP 4. Set a campaign goal and develop a campaign plan for your office.

STEP 5. Promote the campaign by providing campaign information and materials to employees. Coordinate communications, activities and events with volunteers and Campaign Leader.

STEP 6. Make a personal ask to every employee and utilize volunteers to assist you.

STEP 7. Thank employees with a recognition event or written communication.

LEARN THE BASICS

What we're asking of you: to be familiar with campaign benefits and how it helps charities, along with CFD guidelines and procedures.

- ❖ Attend training provided by your agency or the County Campaign Committee.



Contact your Campaign Leader to find out about whether your agency is hosting training or if you should attend County sponsored training. The Campaign Leader listing is at the end of this handbook.

- ❖ Provide training for your volunteers and Campaign Representatives or invite them to attend training provided by your agency or the Local County Committee.
- ❖ Become familiar with procedures for completing and routing of all forms.
- ❖ Make sure you understand when CFD materials will be sent to you.
 - ❗ *Your Campaign Leader, or the CFD Office will know when materials will be sent to you.*
- ❖ You will receive: Promotional flyers for each employee in your office; Contribution Forms, Fundraiser Forms, Charity Guides to be shared amongst employees; Check Logs; and return envelopes to send materials to the CFD office.
- ❖ Serve as the CFD resource person for your worksite.
- ❖ Know who can answer questions and provide assistance.
- ❖ The CFD website is www.cfd.wa.gov. You may wish to review the CFD website and learn about the charities in the CFD campaign. There are links to the charities that have websites. It is ok to visit these sites while at work to obtain information about charities.

ABOUT THE COMBINED FUND DRIVE

- ❖ The CFD Campaign is a statewide workplace giving program directed toward employees at all state agencies, higher education, commissions, boards, and retired public employees, including the City of Seattle.
- ❖ CFD's mission is to enable Washington State employees and public agency retirees to improve their world, their state, and their communities by making it easier for them to support charitable organizations.
- ❖ Founded in 1985, CFD consolidated numerous charitable fundraising campaigns being conducted at state worksites and increased effectiveness for charities by expanding access to payroll deduction. In 1985 the CFD had a total of 16,200 contributors (23% participation) raising \$1.2 million for 850 different charitable organizations.
- ❖ The campaign now offers donors the opportunity to contribute to more than 1,900 local, national and international charities and federations. Donors can select approved charities listed in the CFD Charity Guide, or have the option to suggest a charity. Employees have given over \$67 million since the program's inception.
- ❖ The CFD does not allocate any funds to charities; we only distribute funds based on employees' choices. We respect the right of each state employee to agree or disagree with an accepted charity in our campaign. However, the value of choice remains the greatest driver behind our policy. If an employee is not in agreement with a particular charity's mission in our Charity Guide, he/she is welcome to designate a charity of
- ❖ their choice and no part of their donation will go to any other charity.

ACCESS CFD AT A COMPUTER NEAR YOU!



There is an exciting new way to donate to your favorite charities when giving through the Combined Fund Drive!

The CFD's online Giving Station has been designed to give you...

- ❖ Greater control over your charitable giving.
- ❖ Increased confidentiality of your personal choices in charities and secured personal information.
- ❖ Convenience and efficient access to your donation record anytime - from your computer at work or home.
- ❖ The ability to track your contribution dollars to your charity.
- ❖ Increased transparency and accountability of money management.
- ❖ Less paper.
- ❖ No misplaced forms.
- ❖ Opportunity to ensure your personal information is accurate.
- ❖ More efficient use of CFD staff and resources so attention is focused on what really matters: reducing overhead costs and helping charities.
- ❖ A fun and interactive way to do something positive for your world.

CFD and its charities value your help, and we want to provide you with as many tools and opportunities to give as possible. Look for our new system on the CFD website at www.cfd.wa.gov.

SECURE MANAGEMENT SUPPORT

Having endorsement from your management for your campaign efforts goes a long way in setting the tone for your campaign.



You may want to consider is there someone at your office who can help get management involved? Or someone in management who would enjoy being involved?

Ways to involve management...

- ❖ Ask for their thoughts on how the campaign has operated in the past. Present ideas to management of how you envision the campaign running in your office – ask for their input. Ask for their feedback on individuals who would help comprise a good volunteer team. Ask them for their ideas!
- ❖ Ask management to send an endorsement letter, email or voicemail message to that encourages workplace giving and participation.
- ❗ *You may want to prepare a sample message to make it easier for your Manager. Contact your Campaign Leader or the CFD office if you require a sample letter or script.*
- ❖ Speak in support of the campaign at employee meetings. Show management how to use the GivingStation.
- ❖ Attend activities and special events, especially kickoff and recognition. Ask them to acknowledge volunteers in your office who orchestrate the CFD campaign.
- ❖ Encourage management to offer an incentive for making the office goal.
- ❖ Communication is essential – be sure to keep your management team up to date.

Step 3

RECRUIT A TEAM

- ❖ Evaluate how much help you need. Who wants to be involved? What types of skilled people would you like on your team? What departments or unions should be represented?
- ❖ Invite volunteers who are representative of your office (i.e. different departments, all levels of staff, reflect your office's diversity).
- ❖ Ensure your volunteers are trained, especially on the available resources and how to use the GivingStation. Encourage volunteers to attend trainings or organize a training onsite. Please explain how to properly fill out the contribution forms, review and explain the Charity Guide, and know about the benefits about payroll deduction and the CFD program in general.
- ❖ Assign specific responsibilities to each member, e.g.: scheduling meetings and events, processing fundraiser paperwork, distributing flyers and contribution forms, and tracking results.
- ❖ Decide how many volunteers you will need to contact all employees in order for each employee to receive a personal ask. The CFD recommends one volunteer for every 40 employees.
- ❖ Meet regularly and establish a timeline. For everyone's benefit, keep meetings short and focused.
- ❖ Elect a co-chair to support your role and serve as next year's chair.
- ❖ Thank volunteers often!
- ❖ Consider tracking volunteerism hours at your office to show all the different ways people can give to help their communities.
- ❖ Keep your coworkers involved and up to date on campaign events and accomplishment.

Step 4

DEVELOP A CAMPAIGN PLAN

- ❖ Evaluate your number of employees, any reorganization or increase or decrease of employees that has taken place.
- ❖ Discuss goals and plans with your campaign leader, supervisor, or your office administrator. Review last year's results percent participation, total dollars raised, and average gifts. Consider how much can be raised through special events. Review monies donated at your office's special events last year.



We have found it best to set a participation goal, but you may set a dollar goal if you wish.

- ❖ Evaluate culture of your agency – What are some of the best ways to reach all employees and management in your agency/department?
- ❖ What energizes people in your office and creates enthusiasm?
- ❖ How can you best educate employees about the value of payroll deduction?
- ❖ Develop a timeline for your campaign, including kick off and closing date.
- ❖ Be realistic, but aim high.

PERCENTAGE INCREASE is a goal based on achieving a percentage increase over your office's last year's achievements.

$$\begin{array}{ccccccc} \$ & \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & + & \underline{\hspace{2cm}} & = \$ \underline{\hspace{2cm}} \\ \text{Amount raised last year} & & & \% \text{ Increase} & & \text{Amount raised last year} & \text{2005 Goal} \end{array}$$

Other formulas are available to calculate other increase measurements if you need assistance.

PROMOTE THE CAMPAIGN

Advertise the campaign to assure visibility.



Marketing materials (balloons, posters, the CFD video, brochures, and the CFD carry-all bag are available at training. If you are unable to make training or there is no training in your area, please contact your campaign leader, county chairperson, the county campaign executive or CFD office. If there is no county committee in your area, please contact the CFD office and we will send you the materials available to promote your campaign.

- ❖ Display posters, brochures, signs and literature about CFD and the non-profit agencies your staff supports.
- ❖ Advertise special meetings and kickoff events.
- ❖ Prepare information for employees about your community and services provided by charities included in the CFD.
- ❖ Ask a charity staff person to talk about services provided in the community. This is a GREAT way to show employees the value of their charitable donation.



The CFD Office, or County Committee, can help you identify charity speakers.

- ❖ Show the CFD video at staff meetings.
- ❖ Ask fellow workers to share stories of how they or someone they know were helped by a charity.
- ❖ Submit articles to the CFD office for submission to the FTE newspaper.
- ❖ Submit articles for your agency's intranet.
- ❖ Email a fact a day about the Combined Fund Drive, the charities in the Drive, or the needs of your community.

Step 5


TOP TEN REASONS WHY YOU SHOULD GIVE THROUGH THE CFD

- No. 10 **CFD is targeted.** You choose the amount and the charities receiving your gift.
- No. 9 **CFD Charities are screened.** CFD only lists charities with a proven track record.
- No. 8 **CFD is tax deductible.** You get a record of your payroll contribution every payday.
- No. 7 **CFD is flexible.** Your contribution can be changed at any time by going online. For those at institutions of higher education, please also notify your payroll office. You may increase or decrease your deduction, add and delete charities, or discontinue your contribution with a simple request.
- No. 6 **CFD is efficient and effective.** Volunteers at each state agency/institution conduct the drive so more of every dollar reaches charity. Since the volunteers conduct the annual drive, your favorite charities in many cases, don't have to. This means more of your contribution helps the causes you believe in.
- No. 5 **Your dollar goes farther.** When you give through payroll deduction, accrued interest along with donations made to the CFD program in general, are shared with the member charities meaning approximately 105% of your contribution reaches your charity.
- No. 4 **CFD is easy.** You simply choose between a regular payroll deduction and a one-time gift.
- No. 3 **No more telemarketers.** Well, not really. CFD can't stop them from calling, but it provides you with a ready response when you receive telephone requests. Simply say, "I give through my workplace giving program".
- No. 2 **CFD is a joint effort.** In 2004, over 25,000 state employees and retirees pledged over \$5.46 million to more than 1900 local, national and international charities and federations. Based on our number of employees, Washington State employees' generosity has made our program number one in the country!
- No. 1 **It is a great way to help others and make the world a better place to live.**

Give to your favorite charities through the CFD. Join together with employees and retirees throughout Washington State and make a world of difference.

UTILIZING RESOURCES

Conduct employee staff meetings with the CFD video, employee testimonials or charity speaker.

- ❖ Use icebreaker questions!  *'ou can find question on the next page!*
- ❖ Make sure the meeting does not exceed 30 minutes.
- ❖ Invite a charity speaker to speak for 10-15 minutes at the beginning of an existing scheduled meeting.
- ❖ Serve refreshments.
- ❖ Ask your office manager to give opening remarks.
- ❖ Announce goal, incentives and planned events.
- ❖ Distribute personalized contribution forms and collect them at the end of the meeting.

Employee Meeting Sample Agenda.

To set a positive tone for your rally, use the campaign theme. Play music, serve refreshments and be sure to distribute contribution forms and charity guides to employees as they enter the room.

Show CFD Campaign video 4 minutes
Introduction to Meeting by Local Coordinator 2 minutes
Remarks from leadership person in the office 2 minutes
Testimonial from employee or invite a charity speaker 5 minutes
Closing remarks from Local Coordinator. 4 minutes
Total time: 20 – 30 minutes

Step 5

THE CFD SIT-DOWNS

Instructions:

Ask everyone to please stand. As each question below is posed to the audience, ask those who can answer “yes” to any question to sit down. If a subsequent question also applies, ask those sitting to raise a hand – or two hands – and keep them raised.

Questions:

- Have you, or anyone you know experienced a power outage for more than three days (perhaps due to a severe NW autumn storm?)
- In the last three months, have you spent time in a state or national park, enjoying our pristine environment?
- In the last three months, have you enjoyed any Washington trails?
- In the last three months, have you fished in a Northwest river or lake?
- In the last month, have you benefited from an HOV lane?
- In the last year, have you enjoyed the waters in the Puget Sound area?
- Do you have a child, grandchild, niece or nephew with a special talent in art, music or dance?
- Do you have a friend or relative or themselves given or received an organ transplant?
- Have you, or someone in your extended family, ever given birth to a premature infant?
- Do you have a parent or grandparent afflicted with Alzheimer’s or dementia?
- Did you, or a child you love ever get involved in a youth/after school program?
- Have you or anyone you’ve known benefited from a scholarship?
- Have you, or anyone in your extended family, been diagnosed with cancer, diabetes or stroke?
- Do you have a less than perfect teenager and concerns about smoking, alcohol, drugs or teen pregnancy?
- Are you wearing an article of clothing made in a developing country? (You may ask a neighbor to read a label you can’t reach.)
- Have you or anyone you’ve known benefited from advances in medical research?
- Have you ever experienced a volcanic eruption or an earthquake?
- Have you ever adopted an animal from a pet shelter?
- Have you donated food or clothing in response to a disaster, either domestic or abroad?

Conclusion:

Please look around the room. Yours are the stories behind the Combined Fund Drive. You and those you love, are the one who benefit from and care about charities’ work. You can support them through the Combined Fund Drive. The CFD is not so much about “giving to them” as it is about “investing in us”. The CFD is about sustaining our communities’ capacity to respond in times of need. It’s about recognizing those times of need happen in everyone’s life – in your life and mine. Make an investment that pays important lifetime dividends. Please “Choose to Give.

SPECIAL EVENTS & ACTIVITIES

Have fun!

Enhance your employee giving campaign with contests, games, and special events.



PLEASE BE SURE to contact your Campaign Leader to find out how your agency will be handling fundraisers this year. Cash handling rules have changed and you may have new policies for this and reimbursement.

- ❖ Keep your fundraisers mission focused – have facts about a charity taped around the room during a fun event.
- ❖ Your Campaign Leader will likely organize one main event to kickoff your agency or school's campaign and an event to recognize and close the campaign. Encourage employees to attend. You will have a greater chance of raising more funds for the charities if you have an event to start the campaign and then concentrate on asking 100% of your employees.
- ❖ One key to a successful campaign is to make it **FUN** for your co-workers. Anything you can do to generate some enthusiasm in your office and make participation a benefit, rather than a burden, will help you be successful in your campaign.



Hint: See CFD Website for List of Events and Fundraising Ideas. There is a list of events that have been held in state government over the past 20 years. The list is for reference only, so if you have an event in mind that is not listed, check with your Campaign Leader. Send ideas to the CFD office so we can share them with others. If you have any questions on whether or not the event you are planning will be ok, check with your Campaign Leader or Manager for their approval or the CFD office.

- ❖ The amount of time you spend to plan events, as well as the campaign, is determined by your Agency Director or President. They have the discretion to use state resources, which includes state employee time, equipment, and funds. If you have any questions, contact your Campaign Leader.

FUNDRAISERS

- ❖ Fundraisers are great ways to create awareness, visibility and enthusiasm for your campaign. They can produce campaign contributions in addition to individual employee contributions. All proceeds from special events add to your campaign total.
- ❖ Fundraisers should not replace your incentives and encouragement for a completed Contribution Form. Payroll deduction raises the most monies for charities.
- ❖ **If you need cash to cover the costs for supplies for a fundraiser or special event, contact your Campaign Leader to request it or find out how your agency will process this.** Track expenses not covered by your agency from each fundraiser on an Excel spreadsheet and send it, along with receipts, to your Campaign Leader.
- ❖ **All fundraiser checks should be made payable to the CFD. Fill out a fundraiser form for each fundraiser to send to your Campaign Leader.** Write in the name of the fundraiser. Checks can be made out to CFD for a specific charity, or to CFD non-specified. If you have checks payable to CFD for a specific charity and checks to the CFD non-specified, you will need to make out two forms for the one fundraiser. For those checks payable to CFD for a particular charity, list the charity to receive the donations under Charity Name, write in their code, and the amount of the fundraiser that is designated to them.
- ❖ Cash handling rules changed in 2003 and were revised in 2004. **All cash donations and checks payable to CFD from fundraisers need to be deposited by your finance department within 24 hours of receipt to Fund 525 of the Department of Personnel (Agency 111).** **You will never send cash to the CFD office.** If you are volunteering for a higher education institution, contributions will need to be deposited into your Local Fund and then forwarded to the Department of Personnel's 525 account. **Contact your Campaign Leader to find out about the specific guidelines for your agency, college or university.** Your finance office will provide you with a deposit receipt (an A-8) for each deposit which should be attached to the Fundraising Form.

EDUCATION & MAKING THE ASK

- ❖ Inspiring employees to take action and give to their favorite cause(s) requires that you be able to communicate the ways contributing to charities makes a difference in our communities and our world. You can do this by intranet, newsletters, even voicemail!
- ❖ You can generate some enthusiasm by communicating news about the campaign and sharing interesting information before making the ask. **Invite a Charity speaker to make the Ask!**
- ❖ Make efforts to ensure every employee is personally delivered a Flyer, and has access to a Contribution Form and Charity Guide, which is in print or on the CFD website. You want to ask them if they have any questions about the program. We call this the 100% ASK.
- ❖ Make a personal contact with every employee. Be available to help answer their questions. Do not simply leave Contribution Forms on desks (or inboxes or mailboxes) without a personal ask for involvement.
- ❖ For those utilizing paper Contribution Form ask individuals to return the forms whether or not they give.
- ❖ Have a committee member follow up with employees who attended the employee meeting, but did not advise if they planned to give or not.
- ❖ Have a volunteer follow up with those who were unable to attend the employee meeting.

Reasons why people choose not to give...

- ❖ They are not asked.
- ❖ They are not asked in a kind or respectful manner.
- ❖ Lack of understanding of the results from giving.
 - ❖ Cost of living increase.
 - ❖ Apathy.
- ❖ Balancing the perception that I am helping enough now.
 - ❖ Angry feelings about government.
 - ❖ Struggling economy.
- ❖ Charities' needs seem very far away.
 - ❖ Administrative costs are too high.
 - ❖ Giving through other sources.

YOUR MONEY GOES FARTHER WITH CFD

If a payroll deduction or a check is written to the CFD an additional amount will be added before it is sent out to the charity. An example of a \$100.00 direct donation:

Direct Donation	=	\$100.00
- Administrative Cost (8%)	=	8.00
- Contractor's Fee (2%)	=	2.00
	=	\$ 90.00
+ Non-specified funds (13%)	=	\$ 13.00
+ Interest (2%)	=	<u>\$2.00</u>
Total Sent to Charity	=	\$105.00

Interest is dependent upon return of funds in the State Treasury.

- ❖ When you donate \$100 through the Combined Fund Drive, \$105 will go to the designated charity or federation of the donor's choice. How is this possible?
- ❖ During the Campaign, some employees and retirees elect to donate to the CFD Non-Specified Fund. In addition, monies allocated to this Fund are distributed to the charities that are designated by employees.
- ❖ Contributions to charities are distributed quarterly, and these donations accrue interest between distribution dates. This interest is also added to your designated contribution.
- ❖ Giving through the CFD also saves charities money they would otherwise spend on individual office fundraising appeals. The Combined Fund Drive campaign consolidates non-profit agencies' efforts and marketing costs into one campaign.
- ❖ Payroll deduction also saves charities from needing to process numerous checks. Your money simply goes farther giving through the CFD.

A LITTLE GOES A LONG WAY

\$1 per work day or \$20 per month would provide...

- ❖ Two teens the opportunity to participate in a teen leader program.
- ❖ Two nights of safe shelter for a battered woman and her child.
- ❖ 104 meals a year and 26 rides to work for homeless shelter residents.
- ❖ A school year membership for one child to an afterschool program.
- ❖ A daily snack for an abused child in an afterschool program.
- ❖ Three psychological consults a year for those who cannot afford them.
- ❖ Nine hours of addiction counseling for two women.
- ❖ Breakfast and a snack for a child at a center for kids with emotional problems.
- ❖ Two weeks of childcare to a developmentally disabled toddler.
- ❖ Five computer classes for a displaced homemaker.
- ❖ Five weeks of a women's support group.
- ❖ Dinner for one night per week for a family in a shelter.
- ❖ Parent-child field trip for 20 families at risk of dissolution.
- ❖ Follow-up work site visits for eight developmentally challenged people.
- ❖ Preventing 10 senior citizens from choosing between food and medicine.
- ❖ Four months of transportation to and from a family support program.
- ❖ Fourteen employment workshops/GED test fees for six learners.
- ❖ Daily transportation to and from a senior citizen for one senior.
- ❖ One year's adult basic education instruction, nearly 1000 hours.
- ❖ One year of school-based services for a child victimized by abuse.
- ❖ One-on-on mentoring for three at-risk girls.



Combined Fund Drive Contribution Form

Note: To continue a recurring payroll pledge in 2006 without change, no form is required. If you would like to discontinue your contributions at the end of the year, please check the 'I do not wish to contribute' box on the bottom of this form. Any new recurring payroll pledge(s) entered on this form will replace current contributions as of 1/1/2006.

CFD Website: www.cfd.wa.gov - Phone #: (360) 664-1995 - E-mail: cfid@dop.wa.gov Mail To: PO Box 47500 Olympia, WA 98504-7500

EMPLOYEE INFORMATION Please print clearly - incomplete or illegible forms may be returned.			
PRINT LAST NAME		PRINT FIRST NAME	
PHONE #		E-MAIL	
COUNTRY OF WORK CODE (See back of form)		AGENCY CODE (See back of form)	
		MIDDLE INITIAL	SOCIAL SECURITY #
		MAIL STOP	
		SUB-AGENCY CODE (See your Campaign Leader for the appropriate code)	

PLEDGE 1

Consult your charity guide and choose from any of the listed organizations. Choose only one payment method for this pledge.

CHARITY CODE (from guide)	CHARITY NAME
PAYMENT METHOD (check one)	
<input type="checkbox"/> Payroll (Monthly) <input type="checkbox"/> Payroll (One-Time) <input type="checkbox"/> Personal Check (One-Time)	
AMOUNT (monthly amount or one-time amount)	
\$ _____	

PLEDGE 2

Consult your charity guide and choose from any of the listed organizations. Choose only one payment method for this pledge.

CHARITY CODE (from guide)	CHARITY NAME
PAYMENT METHOD (check one)	
<input type="checkbox"/> Payroll (Monthly) <input type="checkbox"/> Payroll (One-Time) <input type="checkbox"/> Personal Check (One-Time)	
AMOUNT (monthly amount or one-time amount)	
\$ _____	

PLEDGE 3

Consult your charity guide and choose from any of the listed organizations. Choose only one payment method for this pledge.

CHARITY CODE (from guide)	CHARITY NAME
PAYMENT METHOD (check one)	
<input type="checkbox"/> Payroll (Monthly) <input type="checkbox"/> Payroll (One-Time) <input type="checkbox"/> Personal Check (One-Time)	
AMOUNT (monthly amount or one-time amount)	
\$ _____	

PLEDGE 4 or Write-In Pledge

Use for either a 4th pledge or a write-in charity pledge. Choose only one payment method for this pledge.

CHARITY CODE (from guide)	CHARITY NAME (If the charity you wish to give to is not listed in the charity guide, please fill out the write-in charity info below.)
PAYMENT METHOD (check one)	
<input type="checkbox"/> Payroll (Monthly) <input type="checkbox"/> Payroll (One-Time) <input type="checkbox"/> Personal Check (One-Time)	
AMOUNT (monthly amount or one-time amount)	
\$ _____	

Write-In Charity - If the charity you wish to give to is not listed in the charity guide, please fill out the info below.

CHARITY NAME		EIN #	
CHARITY ADDRESS	CITY	STATE	ZIP
CHARITY CONTACT NAME	CHARITY CONTACT EMAIL		
CHARITY PHONE #	CHARITY FAX #		
CHARITY EMAIL	CHARITY WEBSITE (optional)		

PAYMENT: Review the information about your selected payment method.

Payroll

One-time Contribution: Contribution will be made in the new calendar year.
Monthly Payroll Donation: Contributions will occur beginning in the new calendar year.
\$2.00 minimum donation required.

Personal Check

Make check payable to: "Combined Fund Drive".

Write your Charity Code on the memo line. Check will be divided among the charities as indicated above.
Or make separate checks payable to each charity receiving your contribution.
Note: checks must be stapled to this form.

EMPLOYEE AUTHORIZATION

I understand that once started, my monthly payroll contribution will continue automatically unless changed by completing a new Contribution Form or cancelled by submitting written notice to the CFD office. I further acknowledge that any contributions I have made in the past will be replaced as of January 1, 2006 with those designated above.

I hereby authorize the State of Washington to deduct the amount indicated on this form from my pay provided that the amount contributed will be remitted on a regular basis in support of the charities of the Washington State Combined Fund Drive as specified above.

SIGNATURE (required to process your gift)

DATE (mm/dd/yyyy)

X

Your name and email will be sent to your designated charity unless otherwise specified in the check box below:

☐ I wish to remain anonymous

Thank you for your participation!

Please give this form to your local Campaign Coordinator to be sent to the Combined Fund Drive at: PO Box 47500, Olympia, WA 98504-7500.

Please make a copy for your records.

☐ I do not wish to contribute.

COUNTY CODE NUMBERS

Adams	01	Franklin	11	Lewis	21	Snohomish	31
Asotin	02	Garfield	12	Lincoln	22	Spokane	32
Benton	03	Grant	13	Mason	23	Stevens	33
Chelan	04	Grays Harbor	14	Okanogan	24	Thurston	34
Clallam	05	Island	15	Pacific	25	Wahkiakum	35
Clark	06	Jefferson	16	Pend Oreille	26	Walla Walla	36
Columbia	07	King	17	Pierce	27	Whatcom	37
Cowlitz	08	Kitsap	18	San Juan	28	Whitman	38
Douglas	09	Kittitas	19	Skagit	29	Yakima	39
Ferry	10	Kilickitat	20	Skamania	30		

AGENCY CODE NUMBERS

001	Retirees	103	CTED	215	UTC	376	TESC	632	CEC
002	NTSD	104	ERFC	220	FIR	377	SIRTI	634	CCC
003	Seattle	105	OFM	225	WSP	380	WWU	635	CLC
011	REP	106	EDA	227	CJT	387	ART	637	PIE
012	SEN	107	HCA	228	STS	390	WHS	639	CBC
014	JLARC	110	OAH	235	L&I	395	EWB	648	GHC
015	LTC	111	DOP	240	DOL	405	DOT	649	GRC
020	LEAP	116	LOT	245	MIL	406	CRAB	652	HCC
035	OSA	117	GMB	250	SRB	407	TIB	657	LCC
038	JLS	118	CHA	275	PERC	408	MAR	662	OLC
040	SLC	119	CAA	300	DSHS	410	TRC	665	PEC
045	SUP	120	HUM	302	HCQA	460	CRG	670	SCCD
046	LAW	122	PAB	303	DOH	461	ECY	672	SHC
048	COA	124	DRS	304	TOB	462	PLI	674	SVC
050	CJC	126	SIB	305	DVA	465	PARKS	675	SPS
055	OAC	130	PRT	310	DOC	467	IAC	676	CCS
056	OPD	140	DOR	315	DSB	468	EHO	678	TCC
075	GOV	142	BTA	325	SGC	471	SCC	683	WLC
080	LTG	144	MRC	343	HECB	476	GMHB	686	WVC
082	PDC	147	OMWBE	345	SBE	477	DFW	691	YVC
085	SEC	148	HFC	346	WHEFA	490	DNR	692	LWTC
086	INA	150	GA	350	SPI	495	AGR	693	RTC
087	APA	155	DIS	351	SFB	540	ES	694	BTC
090	OST	160	INS	352	SBCTC	550	CTC	695	BATES
091	RDC	165	ACB	353	SFD	599	WHCFA	696	CPTC
095	SAO	167	FIC	354	WFTECB	605	EVC	699	CTCS
099	COS	185	HRC	360	UW	610	EDC	944	SDA
100	ATG	190	IND	365	WSU	621	WHCFA		
101	CFC	195	LCB	370	EWU	627	BCC		
102	DFI	205	BPC	375	CWU	629	BBC		

THANK YOU FOR SUPPORTING THE COMBINED FUND DRIVE!

CFD Check Log

Check Payable To:	Contributor Name	Check No.	Amount	Rcvd by CFD (for CFD use) (Initial & Date)
AGENCY/HIGHER EDUCATION CAMPUS				
DIVISION/DEPARTMENT				
ADDRESS OR MAILSTOP				
NAME OF PERSON COMPLETING THIS FORM	PHONE NUMBER		DATE REPORT SENT TO CFD	

Checks from Employee Contributions

1. List each check one time only. Staple the check to the Contribution Form.
2. Attach the forms and checks to the Check Log and forward them to the CFD/DOP Finance Office, PO Box 47500, Olympia, WA 98504-7500.
3. Do not deposit checks from an individuals' contribution forms in account 525 – it is for fundraisers only.

Checks from Fundraisers:

Checks made payable to the CFD from a fundraiser should be deposited with your finance department (Fund 525, Agency 111)

Step 6

CONTRIBUTION FORMS & ROUTING OF FORMS

- ❖ Please check with your Campaign Leader and decide how you will route completed forms – either directly to the CFD office or through your Campaign Leader.
- ❖ Please make sure all Contribution Forms are filled out legibly and completely. If an employee does not wish to provide a Social Security number OR Employee ID, please be sure a phone number is provided so that the CFD staff can contact the employee with any questions. Additionally, providing the last four digits of the SSN help us track down the employee.
- ❖ When sending the completed forms to the CFD office, place the Contribution Form and Check Log(s) in the white envelope provided. If a contribution type is personal check, please staple the check to the Contribution Form and send it in with the check log. Please make sure all check log totals equal actual check amounts received. All checks need to be listed on the check log.
- ❖ The original copy of the individual's Contribution Form needs to be sent to the CFD/DOP Finance office at MS 47500. If you want a copy of the form, please make a copy for your records.

Step 6

CONTRIBUTION FORMS & ROUTING OF FORMS CONT'D

Rather than printing one form for each employee we will issue a flyer for each employee, and print a lesser numbers of forms. Volunteers can call us and we can send them more forms if necessary. There are additional particulars about processing of *paper* forms.

To Cancel Existing Pledges from *last year's* campaign (that are currently being deducted- whether paper or online: *To cancel an existing contribution before December 31, 2005, you must call CFD or Customer Service. Pledges from the 2004 campaign cannot be changed. They can only be cancelled.*

To Rollover Existing Payroll Pledges: To continue recurring payroll pledges in 2006 without change, no form is required. Recurring payroll pledges for last year's campaign will automatically be rolled over in the 2005 campaign. For example, if I am giving \$10 to United Way Jan – Dec 2005, and do not indicate otherwise, this gift will be rolled over for Jan – Dec of 2006.

To Rollover Existing Payroll Pledges and Also Create New Payroll Pledges: The donor must submit a new form with both the existing payroll pledges and the new payroll pledges.

To Not Rollover Existing Pledges and Also Create New Payroll Pledges: Any new recurring payroll pledge(s) entered on the Contribution Form will replace current deductions as of 1/1/2006. For example, if I was giving \$10 to Red Cross Jan – Dec 2005, and submit a paper form with a recurring payroll pledge to United Way for \$20, beginning 1/1/2006, my only payroll deduction will be \$20.

If a donor submits Multiple Pledge Forms during the campaign the pledges will accumulate (after September 1, 2005). The donor can submit as many paper pledge forms as he wishes. The forms submitted during the campaign season accumulate.

To Not Rollover Existing Payroll Pledges: If you would like to discontinue your deductions after your pledges for this year are done (as of Dec 31, 2005), the donor must check the 'I do not wish to contribute' box on the bottom of the Contribution Form. (or call CFD or Cust Service to cancel).

Fundraiser Forms


All fundraiser forms must be sent to your Campaign Leader with receipts.

Step 6

ENCOURAGE PARTICIPATION WITH INCENTIVES

- ❖ Offer an incentive for returning contribution forms early, even if employees do not fill them out. Give employees a deadline to turn in their contribution form, and if they do so, they will have qualified to be in a prize drawing. Prizes might include: Casual day certificate, special parking space, lunch hour extension, flower bouquets, home-baked cookies, box of chocolates, free month bus passes, one hour late arrival or early dismissal certificate, lunch on the boss, etc.
- ❖ Work with your Campaign Leader for an award for the units who show the greatest increase in volunteers from the previous year.
- ❖ Use incentives to encourage employees to attend the CFD presentation. Entice them in the morning with muffins and coffee or in the afternoon with cookies or cake, tape lottery tickets to the bottom of certain chairs, or put attendee names into a prize drawing at the end of the meeting (must be in attendance to claim the prize).
- ❖ Use incentives as a means to encourage the help of all employees in reaching goals -- whether monetary or participatory. For example, ask management to have a “dress down day” or to do something special for departments making/exceeding your goal, e.g. having a pizza party.
- ❖ Have the Director or managers agree to do something special, silly, funny, etc., if your agency or department exceeds its goal.

REPORT RESULTS & SAY “THANK YOU”

- ❖ Sending “thank you” email and voice mail messages are quick and effective ways to let employees know their returned contribution forms/ participation/ volunteers are appreciated.
 - ❖ Please make sure that any thank you efforts or event is open to all employees – even those who may not have chosen to participate.
 - ❖ Broadcast the success! Report results to employees via e-mail or display a campaign thermometer.
 - ❖ Hold a meeting at the end of your campaign to announce results to your co-workers.
-  *Hint: The CFD Office can give you overall campaign results.*
- ❖ You can hold a thank you event, or combine a thank you event with the meeting to report the results of your campaign. Invite a favorite charity to help express thanks to employees.
 - ❖ Create Recognition Certificates to hand out to your volunteers.
 - ❖ The CFD Office may be able to reimburse some of the costs associated with a thank you event. Check with your Campaign Leader.
 - ❖ Ask your management team to offer a special thanks to all those who gave and to those who volunteered.

Sample Thank you Letter.

Thank you for your gift in this year’s Combined Fund Drive employee campaign. Our communities are a better place because of your generosity. Your support means the non-profit agencies you believe in will receive the ongoing help they require in order to continue providing vital services where they are needed.

Thank you for participating in the Combined Fund Drive. Because of you, issues you believe in will receive the support they need to thrive. Thank you for making a world of difference.
Sincerely, Your Name

SPECIFIC INFORMATION & FORMS

The following pages include:

- ❖ Information on State rules and fundraisers. It's best to check with your campaign leader to determine specific guidelines that relate to your agency or institution of higher education. Understandably, CFD's recommendations defer to your agency's rules and regulations.
- ❖ Information regarding solicitation and vendor policy.
- ❖ A sample of a completed Fundraiser Form. Please check with your campaign leader to determine where fundraising dollars need to be deposited and where you should send all related information.
- ❖ The DOP Cash Handling Policy for Fundraisers
- ❖ Reimbursement Process
- ❖ Counting Participation
- ❖ Sample of the flyer

STATE RULES & FUNDRAISERS

Drawings OK / Raffles Not OK

Raffles - State agencies may not conduct a raffle. A raffle may not be conducted by state employees, but may be conducted by a nonprofit organization that has a raffle license issued by the State of Washington Gambling Commission. Only charitable/nonprofit organizations may conduct a raffle. **Raffles include activities or games of chance that require an entry fee.** If a nonprofit organization sponsors a raffle in a state office, that nonprofit organization shall be listed as beneficiary of the funds raised on any promotional material sent out for the raffle. State employees may sell tickets for the raffle. Commercial businesses and private individuals may not charge a fee, either directly or indirectly, to enter a raffle or drawing, even if the proceeds are to benefit a nonprofit cause.

Drawings - Drawings are an approved activity in the Combined Fund Drive, only when there is no entry fee associated with the activity. Drawings are considered a promotional contest of chance. Drawings are different than raffles. A raffle may require a person to purchase one, or more, chance(s) to win, but a drawing will have only one chance to win. In a drawing, you may not require a person to:

- purchase anything to be eligible to enter
- purchase anything to receive a ticket or game piece
- hand in entry material in person

In a drawing, you may require a person to:

- fill out and return an entry blank (contribution form) though they are not obligated to give to charity.
- pay an admission fee to gain admission to any bona fide exposition, fair, or show for the display or promotion of goods, wares or services.
- attend a demonstration or tour a facility.

SOLICITATION & VENDOR POLICY

- ❖ Please check with your Campaign Leader to learn about your agency's policy on inviting businesses to donate items or provide prizes/incentives for the Combined Fund Drive campaign. We encourage you to be creative, outside the local business community, in obtaining prizes for your events. It is not recommended that state employees solicit local business for prizes. The state ethics law provide a very strong presumption against solicitation by any state officer or state employee for any purpose. Additionally, the local business community is contacted often by individuals during the autumn when many campaigns are in effect.
- ❖ If you want to solicit prizes from private businesses, do so as a volunteer of the Combined Fund Drive, on CFD letterhead, not as an employee of your agency.
- ❖ Call the CFD and the office will provide you with a list of charities that will donate items for prizes, or give you one of the prizes they have in their possession. The CFD staff works with approved charities to obtain prizes for state employees.
- ❖ With new legislation passed, the CFD State Committee is now building relationships with stores which will hopefully help underwrite some of the program's cost. Costco asks that requests be directed through their local marketing office.
- ❖ If a state employee is willing to make an in-kind donation for an event in their agency, the CFD office has a Charitable Donation form that can be filled out for the employee. The employee may then use this form to take a tax deduction for the donation to the CFD. The IRS has determined the CFD to be a "qualified organization" and therefore may receive tax deductible gifts.
- ❖ Please contact the CFD if you will be having an auction. There are special receipts required to differentiate the fair market value and the cost of the item for auction items.

SAMPLE COMBINED FUND DRIVE FUNDRAISING FORM
CFD WEBSITE: <http://hr.dop.wa.gov/cfd> Email: cfid@dop.wa.gov

Section 1 - Please type or print – Incomplete or illegible forms are difficult to process.		
Name of Fundraiser ICE CREAM SOCIAL	Fundraiser No. (leave blank)	Work Phone 360 664 6811
County of Work Code Number <small>(See Back of Form)</small> 34	Name of State Agency or Higher Ed Campus DOP	Division or Office CFD Office
Section 2		
<ul style="list-style-type: none"> ➤ Cash and all checks payable to the CFD should be deposited with agency finance office* Except higher education. Cash received from a fundraiser should be deposited with your agency finance office into Account 525 at DOP (111). ➤ Fundraiser contributions should be made payable either to the CFD or to the CFD for a specific charity having a 501(c) 3 charitable designation. ➤ Please obtain an A-8 receipt from your finance office for each deposit and attach it to this form. ➤ Reimbursements not provided by your agency must be attached to this form with an A-19. Reimbursements will not be made unless an original receipt and A-19 accompany this form. ➤ Please contact your Campaign Leader or the CFD office if further information is necessary. 		
Total Income from Fundraiser <i>(Your attached A-8(s) should equal this amount)</i>		Amount
		\$ 500.00
Less Total Expenses from Fundraiser <i>(Total of the A-19s should equal this amount)</i>		
		- 100.00
<i>If your agency is reimbursing you for fundraiser expenses, please submit A-19 and receipts to your agency finance office. If not, attach A-19 and original receipts to this form.</i>		
Total Amount Fundraiser Earned (Income less expenses)		
		\$ 400.00
Name of Charity	Charity Code	Contribution Amount
Non-Specified Contribution	000 000	\$
Specified Contribution (list charities)		
ABC Charity	123 456	\$ 200.00
DEF Charity	765 432	\$ 200.00
	Total	\$ 400.00
Please check one of the following:		
<input type="checkbox"/> Fundraiser payable to CFD Non-Specified Fund <input type="checkbox"/> Fundraiser payable to CFD for Specific Charities		
Please Sign and Date		

Signature: _____ **Date:** _____

Date: April 17, 2005
Cancels: July 23, 2004

Page: 1 of 5
Approved by:

**Department of Personnel (DOP)
Combined Fund Drive (CFD)
Fund Raising Cash Handling Policy**

The Washington State Combined Fund Drive (CFD) is the organization within Washington State government through which state employees and public agency retirees can make charitable donations to nonprofit organizations. The director of the Department of Personnel (DOP) is authorized to adopt rules for the operation of the Washington State Combined Fund Drive.

This policy applies to all state agencies and higher education institutions engaged in CFD fundraising activities. It does not apply to funds received from individual employees, due to payroll deductions or checks written, for regular CFD contributions.

References for CFD Authority: Governor's Executive Order 01-01; RCW (Revised Code of Washington) 41.04.033; RCW 41.04.035; RCW 41.04.036; RCW 41.04.039; RCW 41.04.040; RCW 41.04.230; RCW 43.01.050, RCW 42.52, and RCW 43.79A.040; Executive Ethics Board Frequently Asked Questions #14-19.

References for Office of Financial Management (OFM) Authority: State Administrative and Accounting Manual (SAAM) 85.50

Contacts: Combined Fund Drive - CFD Program Manager
Department of Personnel - DOP Financial Manager
Office of Financial Management - Agency-Assigned Accounting Consultant

CFD Funds Raised Must Be Safe-Guarded

Agencies must establish adequate internal controls over CFD funds and fundraising activities. Controls should include procedures for Local Coordinators to deposit fundraising donations into the State Treasury within 24 hours of receipt. Refer to SAAM Chapter 20, Internal Control and Auditing, for further information regarding internal controls (<http://www.ofm.wa.gov/policy/20.htm>).

CFD Fundraising Receipts Must be Deposited Daily

Gross receipts, cash, and checks written to the CFD, from CFD fundraising activities, must be deposited into the State Treasury within 24 hours of receipt. Receipts must be deposited **intact** to account 525 (Washington State Combined Fund Drive Account) and credited to DOP (Agency 1110). State agencies must transmit a copy of the AFRS Cash Receipts Journal Summary (Form A8-A) to the DOP Finance Office at PO Box 47500, Olympia, WA 98504-7500. This 24-hour rule applies to all funds required to be deposited into a state treasury or treasury trust fund. Receipts must be deposited **intact**. Deposit of these monies into a local fund or petty cash fund does not meet the requirement of RCW 43.01.050. In the event a state agency or higher education institution is not able meet the deadline for deposit of receipt of fundraising monies into Account 525 within 24 hours, a waiver from this requirement (per SAAM 85.50.10a, <http://www.ofm.wa.gov/policy/85.50.htm>) should be requested from the Office of the State Treasurer (OST). Waiver requests should be sent to the attention of the Deputy Treasurer for Operations. If you have any questions, please contact the Cash Flow Manager at OST, at (360) 902-8906.

Procedure

<u>Action by:</u>	<u>Action:</u>
Campaign Leader/Coordinator	Daily takes all receipts (cash and checks written to Combined Fund Drive) from fundraising events to the agency local finance office. Cash should be counted by two people and recorded before taking it to the agency local finance office.
Agency Finance Office Staff	Receives fundraising receipts form Campaign Leader/Coordinator. Deposits the funds within 24 hours of receipt through the normal process of the agency daily deposits. Completes Form A8-A for each deposit. (The Agency to be credited is the Department of Personnel, Agency Number 1110, Transaction Code 090, Fund 525, and General Ledger Account 5111).

Forwards the original copy of the A8-A to the Office of State Treasurer with the funds, gives a copy to the Campaign Leader/Coordinator, and sends a copy to the Department of Personnel Finance Office for entry into AFRS. **Only the Department of Personnel will enter these transactions into the state financial system.**

If a state or local institution is not part of the State Treasury, funds raised should be deposited into a local fund and a check immediately forwarded for the amount of funds raised to the DOP Financial Services office for deposit into the state treasury. If the check cannot be sent to DOP within 24 hours of receipt of the funds raised, a waiver should be requested as noted above.

The Campaign Leader/Coordinator and local finance office staff will coordinate on tracking total fundraiser funds received and deposited for the campaign.

Campaign Leader/Coordinator

Completes a **CFD Fundraising Form** at the end of the CFD Campaign showing all income and all expenses for the campaign.

1. Cash and Checks written to the CFD

The total amount of funds deposited for all fundraising events, and the expenses for all the fundraising events, will be listed on the **CFD Fundraising Form**. A report showing the amount each charity is to receive must accompany the CFD Contribution Form.

2. Checks written to a specific charity

All checks received during a fundraising event should be made out to the CFD. If checks are written to a specific charity during a fund raising event, the total amount of these checks will be listed on a separate **CFD Fundraising Form**. All such checks shall be sent with the CFD Fundraising Form

to the DOP Finance Office immediately after the fundraising event.

3. Expenses during a CFD Fundraising Event

Receipts for expenses of a fundraising event, will be forwarded to the local state agency or institution finance office.
(Reimbursement policy is listed below)

CFD Reimburses Fundraising Expenses

State agencies may pay for CFD fundraising expenses out of their state budget and request reimbursement from the DOP. The DOP will reimburse agencies for CFD fundraising expenses.

Procedure

<u>Action by:</u>	<u>Action:</u>
Campaign Leader/Coordinator	Forwards receipts for fundraiser expenses to local finance office for reimbursement.
Agency Finance Office Staff	Pays/Reimburses CFD fundraiser expenses with agency funds or petty cash. Invoices CFD Office for all CFD fundraiser expenses (or replenishment of petty cash). (Copies of all expense receipts paid by state agency or higher education institution funds or through the CFD petty cash account will be sent to the DOP Finance Office). Expenses must be recorded for all fundraising events.
Campaign Leader/Coordinator	The Campaign Leader/Coordinator and local finance office staff will coordinate tracking total fundraiser expenses for the campaign.
DOP Financial Services	Reimburses agencies and higher education institutions for CFD fundraising expenses.

CFD May Fund CFD Petty Cash Accounts Within Agencies

Depending on the need, the CFD may fund CFD Petty Cash Accounts (Account 525) within agencies or institutions of higher education. CFD Petty Cash Accounts are used only for CFD Fundraising costs. Establishment of petty cash accounts is subject to OFM approval per SAAM 85.50.60.

(<http://www.ofm.wa.gov/policy/85.50.htm>). Once the petty cash account is approved by OFM; the CFD will issue funds as needed to participating state agencies and higher education institutions.

Procedure

<u>Action by:</u>	<u>Action:</u>
CFD Campaign Leader	Requests the CFD to fund a petty cash account. Requests will be sent to the CFD Office, PO Box 47530, Olympia, WA 98504-7530. Once CFD office approves this request, a request to establish a CFD petty cash account in their state agency or higher education institution will be submitted to their Agency or Higher Education Finance Office.
Agency Finance Office	Requests approval from OFM to establish a CFD petty cash account. Upon receiving OFM approval, forwards a copy of the approval to the CFD Office.
CFD Office	Requests DOP Financial Services to fund a petty cash account for CFD Expenses.
DOP Finance Office Staff	Generates a warrant to the agency or educational institution.

REIMBURSEMENT PROCESS



Check with your Campaign Leader to learn about your agency's policy on processing reimbursements for any event – it may be done internally at your agency. If you need CFD's reimbursement policy it is on our website at www.cfd.wa.gov.

COUNTING PARTICIPATION

- ❖ Please check with your Campaign Leader to determine how your agency will be counting participation. CFD will not be counting individual employees who participate at fundraisers – although agencies are welcome to count donors internally.

2005 Campaign Leader Listing

Agency	CFD Coordinator	Address	City	Zip Code	Phone	Email
Administrator for the Courts	Kathy Erickson	1206 Quince St. SE MS 41170	Olympia	98504-1170	(360) 705-5234	kathy.erickson@courts.wa.gov
African/American Affairs	Mary Bearden	1210 Eastside Street - 1st Floor; Mail Stop 40926	Olympia	98504-0926	(360) 753-0127	mbearden@caa.wa.gov
Agriculture	Julie Carlson	MS: 42560	Olympia	98504-2560	(360) 902-1880	jcarlson@agr.wa.gov
Arts Commission	Mike Yonker	711 Capitol Way S. Suite 600 MS: 42675	Olympia	98504-2675	(360) 586-5348	mikey@arts.wa.gov
Asian/American Affairs	Ellen Abellera	1210 Eastside St. MS: 40925	Olympia	98504-0925	(360) 586-9500	capaa@capaa.wa.gov
Attorney General	Cynthia Jordan	MS: 40107 1110 Capitol Way Ste 120	Olympia	98504-0107	(360) 664-0651	cynthiaj@atg.wa.gov
Auditor	Deborah Spaulding	MS: 40031 210 11th Ave SW Rm G1 GA Bldg	Olympia	98504-0031	(360) 753-6565	spauldid@sao.wa.gov
Bates Technical College	Mike Corso	1101 South Yakima Avenue	Tacoma	-98445	(253) 680-7169	mcorso@bates.ctc.edu
Bellevue Community College	Casey Spence	3000 Landerholm Circle SE A101	Bellevue	98007-6484	(425) 564-4161	cspence@bcc.ctc.edu
Bellingham Technical College	Marie Brown	3028 Lindbergh Ave.	Bellingham	98225-1599	(360) 715-8354	MBrown@btc.ctc.edu
Big Bend Community College	Karen Okerlund	7662 Chanute St NE	Moses Lake	-98837	(509) 793-2008	kareno@bbcc.ctc.edu
Board for Volunteer Firefighters	Julie Ikenberry	MS 40945	Olympia	98504-0945	(360) 753-7318	juliei@bvff.wa.gov
Board of Health	Desiree Robinson	PO Box 47990	Olympia	98504-7990	(360) 236-4104	desiree.robinson@doh.wa.gov
Cascadia Community College	Linda Melde	18345 Campus Way NE	Bothell	-98011	(425) 352-8248	lmelde@cascadia.ctc.edu
Caseload Forecast Council	Kathleen Turnbow	MS 40962	Olympia	98504-0962	(360) 902-0089	kathleen.turnbow@cfc.wa.gov
Central Washington University	Robert Lowery	Barge Hall 406C 400 E. University Way	Ellensburg	98926-7505	(509) 963-1487	loweryr@cwu.edu
Centralia Community College	V'Ann Kostick	600 W Locust St.	Centralia	-98531	(360) 753-3433	vkostick@centralia.ctc.edu
Clark College	Elizabth Sato	1800 E. McLoughlin Blvd	Vancouver	98663-3598	(360) 992-2952	esato@clark.edu
Clover Park Technical College	Amy Goings	4500 Steilacoom Boulevard SW	Lakewood	-98499	(253) 589-5782	amy.goings@cptc.edu
Columbia Basin College	Richard Reisinger	2600 North 20th Avenue	Pasco	-99301	(509) 547-0511	rreisinger@columbiabasin.edu
Community Colleges of Spokane	Sharon Jones	501 N. Riverpoint Blvd - Suite 126	Spokane	-99217	(509) 434-5173	shjones@ccs.spokane.edu
Conservation Commission	Mary Anderson	MS 47721	Olympia	98504-7721	(360) 407-6202	mara461@ecy.wa.gov
Corrections	Debbie Thie	MS:41106	Olympia	98504-1106	(360) 753-2584	djthie@DOC1.WA.GOV
County Road Administration	Rhonda Mayner	MS: 40913	Olympia	98504-0913	(360) 753-5989	rhonda@crab.wa.gov
Court of Appeals - Division I	Eva Marie Prince	One Union Square 600 University St	Seattle	-98101	(206) 464-7750	eva.prince@courts.wa.gov
Court of Appeals - Division II	David C. Ponzoha	950 Broadway - Suite 300 MS TB-06	Tacoma	98402-4454	(253) 593-2970	david.ponzoha@courts.wa.gov
Court of Appeals - Division III	c/o Denise Reilly	500 North Cedar	Spokane	-99210	(509) 456-3082	denise.reilly@courts.wa.gov
Criminal Justice Training Commission	Sonja Hirsch	MS: TB-35, 19010 1st Ave So	Burien	-98148	(206) 835-7372	shirsch@cjtc.state.wa.us
CTED	Jan Marie Ferrell	MS: 42525	Olympia	98504-2525	(360) 725-2652	janf@cted.wa.gov
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Ecology	Gerry Kunkel	300 Desmond Drive MS:47600	Olympia	98504-7600	(360) 407-7149	gkun461@ecy.wa.gov
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Employment Security	Suzanne Greer	605 Woodland Square Loop SE; 2nd floor	Lacey	-98504	(360) 438-4043	SGreer@ESD.WA.GOV
Environmental Hearings Office	Robyn Bryant	4224 - 6th Ave. SE Bldg 2 Rowsix MS 40903	Lacey	98504-0903	(360) 459-6329	robynb@eho.wa.gov
Everett Community College	Craig Perry-Ollila	2000 Tower St	Everett	-98201	(425) 388-9350	cperry@everettcc.edu
Evergreen State College(The)	Kath Major	MS: ADMISSIONS L1309 2700 Evergreen Pkwy NW	Olympia	-98505	(360) 867-6175	majork@evergreen.edu
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Financial Management	Deborah Feinstein	MS 43113	Olympia	98504-3113	(360) 902-0614	deborah.feinstein@ofm.wa.gov
Fish & Wildlife	Sheri David	MS:43200 600 Capitol Way N	Olympia	-98501	(360) 902-2925	davissad@dfw.wa.gov
Fish & Wildlife	Brandy Chinn	MS:43200 600 Capitol Way N	Olympia	-98501	(360) 902-2266	chinnbmc@dfw.wa.gov
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Gambling Commission	Kim Basher	MS 42400	Olympia	98504-2400	(360) 486-3547	kimb@wsgc.wa.gov
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Governor	Austin D'Souza	MS: 40002	Olympia	98504-0002	(360) 902-0387	austin.d'souza@gov.wa.gov
Grays Harbor College	Sandy Zelasko	1620 Edward P. Smith DR	Aberdeen	98520-7599	(360) 538-4000	szelasko@ghc.ctc.edu
Green River Community College	Megan Evans	12401 SE 320th St	Auburn	98092-3699	(253) 288-3382	mevans@greenriver.edu
Growth Management HB CPS	Linda Store	900 4th Ave. Suite 2470	Seattle	-98164	(206) 389-2625	lindas@cps.gmhba.wa.gov
Growth Management HB WW	Patricia Davis	905 24th wy SW Ste. B2 / MS 40953	Olympia	98504-0953	(360) 664-8966	patdavis@ww.gmhba.wa.gov
Growth Management Hearing Board	Judy Wall	15 West Yakima Ave. Suite 102	Yakima	-98902	(509) 574-6960	jwall476@ew.gmhba.wa.gov
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Health Care Authority	Terry Townsend	MS: 42691 676 Woodland Sq Lp SE	Lacey	-98504	(360) 412-4385	ttow107@hca.wa.gov
Higher Education Coordinating Board	Terrina Henslin	917 Lakeridge Way MS: 43450	Olympia	98504-3430	(360) 753-7825	terrinaq@hecba.wa.gov
Highline Community College	Rachel Jamison/Lisa Scurry	2400 S. 240TH ST.	Des Moines	-98198	(206) 870-3774	rjamison@highline.edu
Horse Racing Commission, Washington	Robert M. Leichner	6326 Martin Way Suite 209	Olympia	98516-5578	(360) 459-6462	rleichner@whrc.state.wa.us
House of Representatives	Ann Plunkett	Mail Stop 40600;	Olympia	98504-0600	(360) 786-7892	plunkett.ann@leg.wa.gov
Housing Finance Commission	Tommy Wang	1000 2nd Ave, Ste 2700	Seattle	98104-1046	(800) 767-4663	
Human Rights Commission	Renee Knight	MS: 42490 711 S. Capitol Way, Suite 402	Olympia	98504-2490	(360) 753-6777	rknight@hum.wa.gov
Indeterminate Sentence Review Board	Robin Riley	MS 40907 4317 6th Ave, 3rd Floor	Olympia	98504-0907	(360) 493-9266	rriley@doc1.wa.gov
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Industrial Insurance Appeals	Bob Liston	MS 42401	Olympia	98504-2401	(360) 753-9639	liston@biia.wa.gov
Information Services	Cally Whiteside	605 11th Ave SE MS: 42445	Olympia	-98504	(360) 725-5314	callyw@dis.wa.gov
Information Services	Amy Ray	MS 42445 1110 Jefferson St. SE	Olympia	98504-2445	(360) 902-3505	AmyR@dis.wa.gov

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Investment Board	Kae Schmidt	PO Box 40916	Olympia	-98504	(360) 956-4747	kschmidt@sib.wa.gov
Joint Legislative Audit Review Committee	Prudy LaBar	MS 40910 506 16th Ave SE	Olympia	98504-0910	(360) 786-6690	labar.prudy@leg.wa.gov
L.E.A.P. Committee	Teah Stockwell	MS 40934	Olympia	98504-0934	(360) 786-6104	stockwel_te@leg.wa.gov
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Labor and Industries	Julie Black	MS: 44821	Tumwater		(360) 902-4964	
Lake Washington Technical College	Kathy Floyd	11605 132nd Ave. NE	Kirkland	98034-8506	(425) 739-8212	Kathy.Floyd@lwtc.edu
Lake Washington Technical College	Mia Calkins	11605 132nd Ave. NE	Kirkland	98034-8506	(425) 739-8200	mia.regan@lwtc.edu
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Legislative Transportation Committee	Shelly McGuire	MS 40937 531 15th Ave SE	Olympia	98504-0937	(360) 786-7313	mcguire_sh@leg.wa.gov
LEOFF Plan 2 Retirement Bd	Jessica Burkhart	MS: 40918	Olympia	98504-0918	(360) 586-2322	jessica.burkhart@leoff.wa.gov
Licensing	Lawna Knight	MS: 48001 1125 Washington St SW	Olympia	-98504	(360) 664-1445	lknight@dol.wa.gov
Licensing	Nicole Cope	MS: 48001 1125 Washington St SE	Olympia	-98504	(360) 902-3766	ncope@dol.wa.gov
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Lower Columbia College	Mary Ellen Pietz	P O Box 3010	Longview	98363-0310	(360) 442-2200	mpietz@lcc.ctc.edu
Military Department	Jerald Compton	Emergency Management Div Bldg 20 MS: TA/20	Camp Murray	-98430	(253) 512-7003	j.compton@emd.wa.gov
Minority and Women's Business Enterprises	Josh Anander	406 South Water Street MS 41160	Olympia	98504-1160	(360) 704-1185	josha@omwbe.wa.gov
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North Seattle Community College	Jeff Caldwell	9600 College Way North	Seattle	98103-3599	(206) 527-3646	jcaldwel@sccd.ctc.edu
North Thurston School District	Shawn Lewis	305 College Street	Lacey	-98516	(360) 412-4400	slewis@nthurston.k12.wa.us
Olympic College	Joan Hanten c/o Gwendolyn Garrett	1600 Chester Ave MS: CSC5	Bremerton	98337-1699	(360) 475-7120	jhanten@oc.ctc.edu
Outdoor Recreation Interagency Committee	Patty Dickason	MS 40917	Olympia	98504-0917	(360) 902-3012	pattyd@iac.wa.gov
Parks and Recreation Commission	Chris Regan	7150 Cleanwater Ln. MS 42650	Olympia	98504-2650	(360) 902-8632	chris.regan@parks.wa.gov
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Personnel	Stacey Tichenor	MS: 47500	Olympia	98504-7500		staceyt@dop.wa.gov
Personnel Appeals Board	Jennifer Gammell	2828 Capital Blvd. MS: 40911	Olympia	98504-0911	(360) 664-0386	jgammell@pab.state.wa.us
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Public Disclosure Commission	Craig Franchuck	MS 40908	Olympia	98504-0908	(360) 664-4746	cfranchuk@pdc.wa.gov
Public Employment Relations Commission	Majel Boudia	MS 40919 711 Capitol Way S. Suite 603	Olympia	98504-0919	(360) 570-7311	mboudia@perc.wa.gov
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Revenue	Kathy Martin	MS 47462 6500 Linderson Way Suite 201	Tumwater	-98501	(360) 725-7446	KathyMa@dor.wa.gov
School Directors Association	Harry Frost	201 College Street MS 40921	Olympia	98516-0921	(360) 252-3003	h.frost@wssda.org
School for the Blind	Janet Merz	2214 East 13th St. MS: S-27	Vancouver	98661-4120	(360) 696-6321	janet.merz@wssb.wa.gov
School for the Deaf	Colleen Engh	MS S-26	Vancouver	-98661	(360) 696-6525	colleen.engh@wsd.wa.gov
Seattle Central Community College	Olivia Blake	1701 Broadway 2BE 4180	Seattle	98122-2400	(206) 587-3851	oblake@sccd.ctc.edu
Seattle Community Colleges District Office	Harrietta Chu	Siegal Center, 1500 Harvard	Seattle	98122-2400	(206) 587-4135	Hchu@sccd.ctc.edu
Seattle Community Colleges District Office	Albert Crusoe	Siegal Center, 1500 Harvard	Seattle	98122-2400	(206) 587-4136	acrusoe@sccd.ctc.edu
Seattle Vocational Institute	Elma Horton	2120 S. Jackson	Seattle	-98144	(206) 587-4969	ehorton@sccd.ctc.edu
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Senate	Jack Brummel	MS: 40466 101 Pritchard Bldg, 415 15th Ave. SW	Olympia	98504-0466	(360) 786-7428	brummel_ja@leg.wa.gov
Sentencing Guidelines Commission	Yvonne McDonald/ Andi May	MS: 40927	Olympia	98504-0927	(360) 956-2135	YvonneM@sgc.wa.gov
Services for the Blind	Bryce Gardella	3411 S. Alaska Street MS: TB 77	Seattle	98118-1631	(206) 721-6454	brygardella@dsb.wa.gov
Shoreline Community College	Marcie Riedinger	16101 Greenwood Ave N	Shoreline	98133-5667	(206) 546-5863	mrrieding@shore.ctc.edu
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Social & Health Services	Rhonda Hammond- Paul and Susan Sadler, CH	1115 Washington St; MS: 45710	Olympia	-98504	(360) 902-7958	rham300@dshs.wa.gov and sasu300@dshs
Social & Health Services	ALLEN MILLER, ADSA	640 WOODLAND SQ LP SE; MS:45600	LACEY	-98503	(360) 725-2475	MILLEAM@DSHS.WA.GOV
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Social & Health Services	Luisa McEachern, ESA	1009 College St SE; MS:45440	Lacey	98504-5440	(360) 725-4891	MCEACML@dshs.wa.gov
Social & Health Services	Elyse May, Exec	14th & Jefferson, OB-2; MS: 45130	Olympia	98504-5130	(360) 902-7832	mayem@dshs.wa.gov
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South Puget Sound Community College	Samantha Soto	2011 Mottman Road SW MS 40966	Olympia	98504-0966	(360) 596-5374	ssoto@spscc.ctc.edu
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State Law Library	Pat Shriver	Temple of Justice MS 40751	Olympia	98504-0751	(360) 357-2152	patricia.shriver@courts.wa.gov
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Statute Law Committee	Kerry Radcliff	MS 40551 415 15th Avenue SW	Olympia	98504-0551	(360) 786-6777	radcliff_ke@leg.wa.gov
Superintendent of Public Instruction	Lynn Hallock	MS 47200	Olympia	98504-7200	(360) 725-6111	lhallock@ospi.wednet.edu
Supreme Court	Kathy Erickson	MS 41170	Olympia	98504-0929	(360) 705-5234	kathy.erickson@courts.wa.gov
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Transportation	Joyce Norris	MS:47400	Olympia	98504-7400	(360) 705-7400	norrisj@wsdot.wa.gov
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University of Washington	Kerri Everly	Box 359200	Seattle	-98195	(206) 616-5437	keverly@u.washington.edu
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Veterans Affairs	Chris Moncrief	MS 41150	Olympia	98504-1150	(360) 725-2184	chrism@dva.wa.gov
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Washington State University	Theresa MacNaughton	Student Rec. Center 250 PO Box 641830	Pullman	99164-1830	(509) 335-2704	macnaut@wsu.edu
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Workforce Trng Ed & Crdntg Board	Darlene Bartlett	MS: 43105	Olympia	98504-3105	(360) 753-5677	dbartlett@wtb.wa.gov
Yakima Vallley Community College	Mark Rogstad	S. 1107 16th Ave	Yakima	-98902	(509) 574-4676	mrogstad@yvcc.edu

